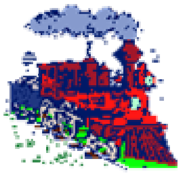
Tennessee ♦ Records ♦ Administration ♦ Information ♦ Newsletter



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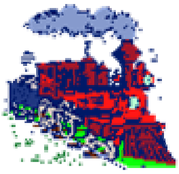

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Consider Document Imaging . . . .

Are you tired of waiting for your co-worker to return a file into the file cabinet that you need right now? Are you tired of looking for misplaced files? Well, there may be a solution to your problem if your agency decides to replace your file cabinets with a document imaging system.

With a document imaging system, you won't have to wait until your co-worker returns a file into the file cabinet because the images will be centrally available. In other words, more than one person will be able to view the same file at the same time. An efficient document imaging system can prevent lost records, save storage space, retrieve records in a matter of seconds, and manage records systematically.

An efficient document imaging system can prevent lost records…...

So what is document imaging? It is a process where paper records are converted into electronic images on a computer and those records can then be stored and retrieved. But before you decide to get rid of some of your file cabinets, you should realize that there are basic steps involved in implementing an imaging system. Such as: scanning the documents into the system; storing the documents onto a hard drive or optical disk; indexing or organizing the documents; implementing a system so that the documents can be retrieved, and finally, providing a good access system which will allow the documents to be viewed by authorized staff in several different ways such as sharing documents via the internet or an intranet.

(Continued on page 2)

Form Titles

The title is one of the most important identifying items on a form. Forms without titles are rare. One of the major difficulties people have with the title is that of trying to make it too descriptive, including all the form's functions. The title is a bit like the form number in that it is a "handle". But this time it's a handle for the users rather than the administrators. It is a unique means of identification for most forms but also serves as a means of clarifying to the user that the correct form is being used.

If a form is multifunctional, it is best to pick the most common function. Clearly indicate the primary subject matter and the application. For example, Insurance Claim. Insurance is the subject and Claim is the application.

As much as possible, avoid connecting words such as "of" and "for". Placing the subject first usually achieves this. Words such as "Form", "Slip" and "Sheet" should not appear in the title. These words do not indicate the function of the form.

The form title must be placed on all forms used in State government.

Source: Managing Business Forms by Robert Barnett, 1996

(Continued from page 1)

Consider Document Imaging...

Now with the convenience of storing documents on CD (Compact Disc), DVD (Digital Video Disc or Digital Versatile Disc), or in a network, it makes it easier to share files with appropriate personnel and clients.

And don't forget, regardless of media type, a Public Records Commission approved Records Disposition Authorization (RDA) is required.

So the next time you get ready to grab a file from the file cabinet and it's missing, you may want to consider document imaging.

By Carolyn Jamison

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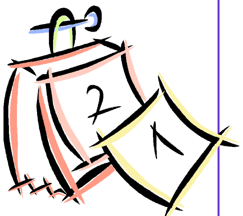
Mark Your Calendar

October 20, 2004
RMD Twelfth Annual
Fall Seminar
Look for Details



FOREMOST

As many of you know, Foremost (new records management software) has been in production since April 1, 2004. There have been moments of jubilation and of frustration. This happens with any new software installation. But with the help of our customers (agency users), Dept. of General Services' Information Systems staff, OIR and the Records Management Division, we are overcoming many problems we have encountered.

The vendor, Documentum, is working with us to supply a space management component plus will supply us with an update to Foremost before the end of 2004. The update will include some enhancements suggested by the users plus include additional features.

The Records Management Division is excited to bring this new application to its customers. We thank you, our customers, for your cooperation and your patience. If you have suggestions for improvements, please feel free to email to donna.k.bridges@state.tn.us

By Donna Bridges

New RMD Employee

Rick Hudson brings to the Records Management Division over ten years of shipping and receiving experience. Rick's friendly personality and pleasant smile have already proven to be an asset to the division as he interacts with the many agencies.

We look forward to having Rick as an employee for many years.

By Herbert Hobson

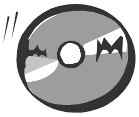
Chester Hughes

Many of you know the Director of the Records Management Division, Chester Hughes. Sadly, Chester suffered a "light" stroke in mid-May. He is recovering at home and the prognosis is for a full recovery.

If you would, please remember Chester and his family with your positive thoughts and/or prayers.

Don't miss future issues. If you aren't receiving a notice about TRAIN being put our website, please send your e-mail address to:
Elaine.Eason@state.tn.us

Micrographics Section Receives Three New Scanners



As reported in the last issue of TRAIN, the Records Management Division (RMD) has purchased three new Canon Hybrid document scanners which are in full production. Various agencies are taking advantage of the scanners and their ability to produce quality user friendly CDs.

The Micrographics Section of RMD, which is responsible for imaging documents, is currently working on four scanning projects. They include:

- Department of Education's Teacher Experience Verification records—CD only
- TDOT's Federal Assistance Project records—Microfilm and CD
- Board of Probation and Parole's Tracking Fees—Microfilm and CD
- TWRA's Boat Registration permits—CD only

Numerous agencies are preparing documents to be sent to RMD for imaging to microfilm and/or CD.

If your agency has records that have long retention periods (seven years or more) and the **RDA** specifies that your records are to be placed in another media besides paper, please contact John Stanley, Micrographics Supervisor or Alice Drummond, Records Manager at the State Records Center at 615-741-1718. We will be glad to meet with you and your agency management and explain how we can pickup your records, scan them and place the records on CD. Your documents will be at your fingertips within seconds rather than spending hours or sometimes even days of your valuable time looking through endless file cabinets and boxes.

Let the Records Management Division help your agency tame the paper monster.

By John Stanley

Foremost and Records Center Helpful Hints

Delivery

The Records Center delivers agency records to the downtown area each Tuesday. The cut off time to order records for delivery on Tuesday is Monday at 12:00 p.m. This should give everyone ample time to order their records.

Pickup

You may order records at any time if you wish to pick-up from the Records Center. Someone from the Records Center will call and let you know when you can pick up the records.

Emergency Orders

After placing your records order on the Foremost/Records Manager website, notify the Records Center of your emergency by email or phone. Contact Deneen McNeil via at deneen.mcneil@state.tn.us or by phone at 615-741-1718.

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Foremost and Records Center Helpful Hints

Creating new boxes

When creating new boxes, remember you have only 250 characters/ spaces available for details. Use abbreviations to save space (example: County=Co, Southeast=SE) and that your agency will understand. Limit details to pertinent information only.

Check all numbers and names before you click the create button when adding new boxes. The system will not allow you to make changes once it is created. If you find that you have made a mistake, call the Records Center so it can be corrected.

On the left side of website page, find the link titled "**View Reports**". Click on down arrow next to "**Select Report**" then click on "**Box Report**" and print a copy of the new boxes. The system will give you the Records Center box numbers. You must print this the same day it is entered in Foremost.

When you have finished entering your new boxes, notify Erin Shorter at 615-741-1718 or by e-mail erin.shorter@state.tn.us. She needs to know the dates entered, allotment code, and the number of boxes. After receiving this information, Erin will send you labels for your boxes.

After labels have been applied to the boxes, call Herb Hobson to schedule pickup or time you will deliver the boxes to the Records Center.

Reservations

After requesting records or boxes, find the link titled "**View Reports**" and click on down arrow next to **"Select Report"** then click **on "Reservation Report"** and print. The list can be used to check what records have been requested from the Records Center.

Log in or other probems

If you have problems in these areas, call Alice Drummond at the State Records Center at (615) 741-1718.

By Alice Drummond

Basic Records Management Training

E-mail Publishing

RDAs

Retention Schedules

State-wide RDAs

Micrographics

Electronic Records

June 24, 2004
July 29, 2004
August 26, 2004

Classes are offered each month at the State Records Center, 843 Cowan St., Nashville. Participants learn the tools of Records Management including information on the above topics. This class is beneficial to Records Officers and anyone who works with records.

The classes can be designed specifically for an agency or individual group. It's free but seating is limited. Please register early by contacting Carolyn, Claude or Elaine at 615-741-1718.

By Claude Cartwright

POLICIES

&

PROCEDURES

Records and Forms Review Committee

The purpose of the Records and Forms Review Committee is to take measures to reduce the costs associated with the creation and maintenance of records and forms generated by the agency. It is recommended that the committee be composed of representatives selected by the commissioner or chief executive to include, but not limited to, the records officer, forms officer, and information system manager.

Committee Responsibilities

The division head must approve the creation or revision of each proposed records series or form originating in his/her division. After this approval, a sample of the proposed records series or form should be forwarded to the Records and Forms Review committee chairperson. The sample should be accompanied by a completed Records Inventory Worksheet (GS-0522 Rev. 08-01) or the Forms Justification and Approval Request (GS-0540 Rev. 12-98).

32 Most Important Email Etiquette Tips

1. Be concise and to the point
2. Answer all questions, and pre-empt further questions
3. Use proper spelling, grammar & punctuation
4. Make it personal
5. Use templates for frequently used responses
6. Answer swiftly
7. Do not attach unnecessary files
8. Use proper structure & layout
9. Do not overuse the high priority option
10. Do not write in CAPITALS
11. Don't leave out the message thread
12. Add disclaimers to your emails
13. Read the email before you send it
14. Do not overuse Reply to All
15. Mailings > use the bcc: field or do a mail merge
16. Take care with abbreviations and emotions
17. Be careful with formatting
18. Take care with rich text and HTML messages
19. Do not forward chain letters
20. Do not request delivery and read receipts
21. Do not ask to recall a message
22. Do not copy a message or attachment without permission
23. Do not use email to discuss confidential information
24. Use a meaningful subject
25. Use active instead of passive
26. Avoid using URGENT and IMPORTANT
27. Avoid long sentences
28. Don't send or forward emails containing libelous, defamatory, offensive, racist or obscene remarks
29. Don't forward virus hoaxes
30. Keep your language gender neutral
31. Don't reply to spam
32. Use cc: field sparingly

source: http://www.emailreplies.com